

SPONSORED CONTENT

# 2022 State of the BED BUG CONTROL MARKET



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# A Word From Envu

Methods for controlling bed bugs are constantly evolving as the industry works to better protect people's homes, health and businesses. Innovation is top of mind at Envu, and bed bug control in particular is a segment where we are focused on bringing new, impactful technologies to the market. This commitment to driving the industry forward is why Envu is proud to sponsor the 2022 State of the Bed Bug Control Market report which provides pest management professionals important insights and analyses to give them a greater understanding of the dynamic bed bug control market. We are thankful to everyone who took time to be surveyed and interviewed for this essential resource.

At Envu, Temprid® FX insecticide is our tried-and-true product for controlling bed bugs. It is a flexible, powerful response to these hard-to-kill, parasitic pests. We also have the leading scientists and technical experts in the field who can provide guidance and share best practices at any time. This combination of Temprid FX and expertise from Envu gives pest management professionals the confidence to take on the toughest bed bug jobs.

There is no question the industry has improved in controlling bed bugs. We are more precise now than ever before in our treatments. We have also become stronger in our knowledge and methods for prevention and inspection. However, there is still a significant stigma associated with these pests, and customers are hypersensitive about infestations, which means we have to keep our focus on innovating solutions that deliver peace of mind.

Pest management professionals can count on Envu to continue providing the highest-quality products and essential expertise they have come to expect. They can also depend on Envu to lead the way in moving the industry forward.

Sincerely,

**Matt Remmen**, Technical Market Development  
Manager, Envu Professional Pest Management





# Looking Back, Getting Ahead

When PCT surveyed pest management professionals in 2017, 71 percent were offering bed bug services. As of 2022, that number has risen a sizable 15 percent, as a significant majority of PMPs — 86 percent — now consider bed bug work to be meaningful enough to make it part of their businesses.

“When bed bugs first became a widespread issue, it was disastrous; nobody wanted to treat them,” said Greg Stephens of Ultra Pest Control in Huntington, W.Va. “In part, that was because we didn’t have the chemistries we have today. The difference in the quality of the products we used five or 10 years ago versus what’s available now is remarkable. We also didn’t have the knowledge or training we needed to eliminate bed bugs. Since then, we’ve had access to seminars, books, online classes and trial and error — all of which have helped us learn how to manage them successfully.”

John Young of Speed Exterminating Company in Cleveland, Ohio, remembers those early days, too. “In apartment buildings, we would find that we were just repelling the bed bugs with the pyrethroids we were using. They would scatter and infest other units. That’s why so many companies started turning to heat treatments,” he said. “We looked at it a different way. I knew my great-grandfather had solved this problem without expensive heat equipment back in his day, and I was determined to find the way that would work for us generations later. When dual-action chemistries came along, we knew we had hit on something; we’ve kept them in play ever since.”

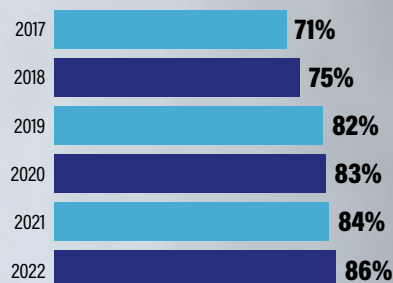
Education on the consumer side has made a positive difference in the bed bug game as well, said Stephens. The stigma of having bed bugs has waned, and people are more likely to call while their infestation is manageable. “When I started treating bed bugs seven years ago, customers would ask whether we had bed bug images on our truck. They didn’t want their neighbors knowing why we were there,” he said. “That doesn’t happen much anymore. Consumers are much more educated today, plus everybody seems to know somebody who has had bed bugs. They know that person doesn’t live in filth, and that helps them understand that anyone can get bed bugs.”

Stephens, who said bed bug work accounts for more than a third of his business, has a lot of success with his “Don’t let the bed bugs bite” yard sign awareness campaign, which not only advertises but normalizes bed bug control services. “Bringing the topic out into the open makes people feel more comfortable about their own circumstances,” he said. “They know they’re calling a friendly, nonjudgmental company who really wants to help them solve their bed bug issue.”

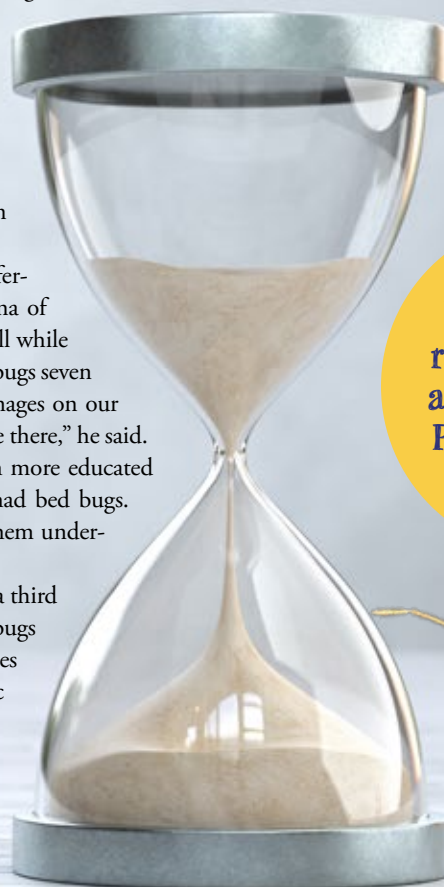
What a difference five years makes. PMPs fill us in on how bed bug control has changed and grown.

## RISE AND SHINE

Does your company location offer bed bug control services?



Source: Readex Research; Number of Respondents in 2022: 165



Bed bug work represented, on average, 13% of PMPs’ revenues

Source: Readex Research; Number of Respondents: 142



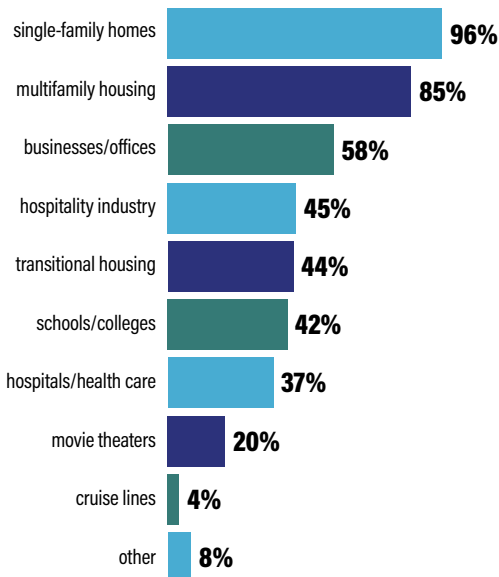


# Steaming AHEAD

As life gets back to normal, PMPs are preparing for bed bug activity to increase.

## MARKET KNOWLEDGE

Which of these bed bug markets does your location serve?



Source: Readex Research; Number of Respondents: 142;  
Respondents could select multiple answers



Bed bug activity varied over the past year, depending on the market segment and geography. Most places seem to be seeing increasing activity, however, as Americans have gone back to work and school and resumed vacation and other travel plans during the spring, summer and fall of 2022.

“Similar to many areas of the country right now, the Boston area is still in a bit of a lull in terms of bed bug calls, but we anticipate getting back to pre-pandemic levels soon,” said Amanda Forrester of Pest-End in Plaistow, N.H. “People are traveling again, plus students are going back to college in person, rather than remotely. These activities are typically associated with increased bed bug pressure; we are expecting an increase in both our residential and commercial bed bug service calls.”

John Young of Speed Exterminating Company in Cleveland, Ohio, said that while bed bug work in the residential market has fluctuated in recent years, his health care business never stopped growing. “Hospitals and other health care facilities can’t risk having a bed bug move from one patient to another, so if they see even one, they want the room checked out,” he said. “Servicing bed bug accounts isn’t always about treating big infestations. Just as often, it’s about providing peace of mind. People want to be able to say, ‘We know there was a sighting in the courtroom or our business or our hospital, but we can assure you that our pest management company has checked it out and taken appropriate action. We’re OK now.’”

Just more than half (51 percent) of PMPs said that single-family homes represented the largest portion of their bed bug revenue, while 37 percent said apartments and other multifamily properties did. Only 6 percent made the most in the commercial market, and 3 percent in institutional.

# Cautious Optimism

The prospects for growth are there when it comes to bed bug control, but so are the challenges.

Overall, PMPs who offer bed bug services have a positive outlook of what's to come from a business standpoint. Eighty-two percent look for their bed bug calls to increase or hold steady, and 94 percent look for the percentage of revenue generated by bed bug work to increase or remain steady year-over-year. Over the past five years, bed bug work has become a more significant portion of the business for 39 percent

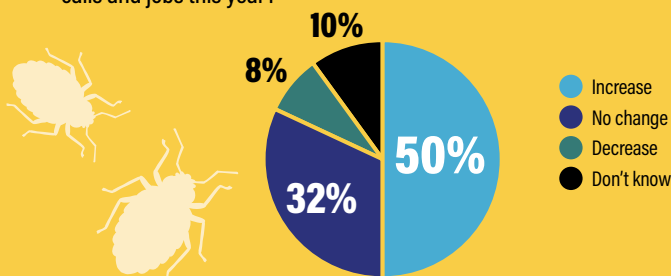
of respondents, while 44 percent reported no change. Only 8 percent said it has become less significant to their business. (Another 8 percent didn't offer bed bug services five years ago.) Many are looking to grow their bed bug business.

In some markets, however, there are challenges to growth. The labor shortage, decreased demand and increased competition topped the list of issues PMPs faced. "There's a lot of bed bug

pressure in our market right now; unfortunately, due to staffing shortages, it's more business than we can handle," said Lucas Geer of Walker Pest Management in Greenville, S.C. "We've made the strategic decision to focus on termite work, at least in the short term, because that work is more flexible in terms of scheduling. Understandably, customers are willing to schedule out further for preventive termite services than they are for bed bug treatments. Once the labor market opens up a bit and we're able to get staffed back up, we'll be able to take on more bed bug work again."

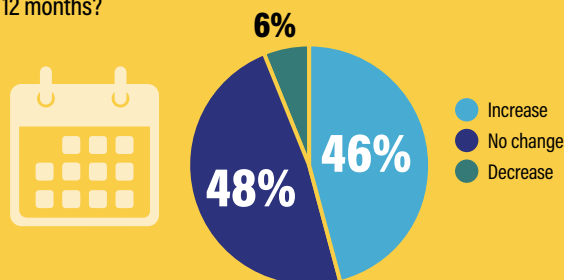
## GREAT EXPECTATIONS

Compared with last year, do you think your market area will see an overall increase or decrease in the number/frequency of bed bug calls and jobs this year?



Source: Readex Research; Number of Respondents: 142

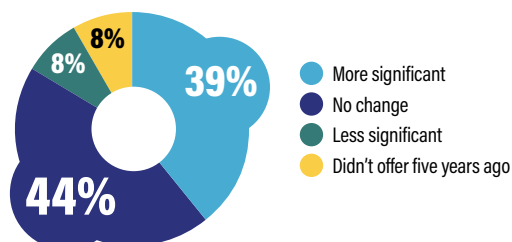
How do you expect the percentage of revenue generated by your location's bed bug control services to change in the next 12 months?



Source: Readex Research; Number of Respondents: 142

## PORTION CONTROL

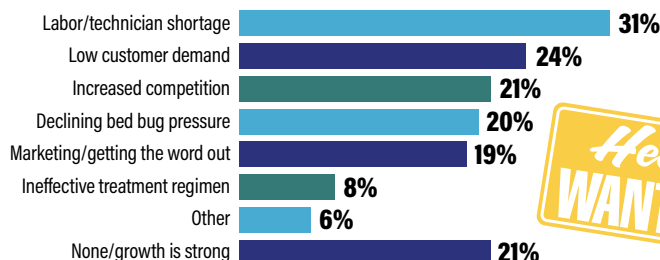
In the past five years, have bed bug control services become a more or less significant portion of your location's business?



Source: Readex Research; Number of Respondents: 142

## CHALLENGE ACCEPTED

In your opinion, what challenges are holding back the growth of your location's bed bug services?



Source: Readex Research; Number of Respondents: 142; Respondents could select multiple answers







# Just the TREAT

When it comes to bed bug control, PMPs are trusting pesticides more and more.

Pesticides have become the go-to bed bug treatment for roughly four out of five (83 percent) PMPs; that's up from 71 percent five years ago. Eleven percent rely on heat as their primary treatment and 2 percent steam. In terms of what they offer customers overall, 99 percent of PMPs say insecticide treatments, 65 percent mattress encasements or active mattress liners, and 50 percent monitoring. Fewer than half offer vacuuming, heat, steam, canine detection, fumigation or cold treatments.

Dan Baldwin of Hawx Pest Control believes that the more options you have available to customers, the better. "Bed bugs are very circumstantial," he said. "Heat treatments are often the best way to go, but not always possible. Chemical treatments can work, but they're very time consuming, and you're more prone to gaps. It comes down to starting fresh with each property, looking at the indi-

vidual circumstances, having your entire toolkit in front of you and choosing the approach that's right."

From there, you need to communicate the available options, Baldwin added. "We explain, 'Based on your circumstances, our best approach is going to be XYZ. Here's what it costs, what the guarantee is and what options you have, if that doesn't work for you.' The way to make sure you have a satisfied customer is to be really clear with the expectations. 'If we do this, this is what you can expect; if we do that, this is what you can expect.'"

John Young of Speed Exterminating Company, Cleveland, Ohio, agrees it takes some detective work to figure out the right approach, but there's no doubt in his mind that pesticides get the job done. "We've tried a variety of tools — vacuums, for example — but I've found better success just having our technicians dig in, find where the bed bugs are and direct kill them with an in-

secticide. It just goes right back to getting your knees dirty, digging in and solving the problem," he said.

Lucas Geer said that Walker Pest Management, Greenville, S.C., is among the 23 percent who offer heat treatments as one of their control methods. "We have found that heat, supplemented with insecticides, is the best way to go," he said. "We get great results raising the heat to 130 degrees Fahrenheit and holding it for two to four hours — we move the bedding around at regular intervals to make sure bugs can't get into isolated spots. We also dust the wall voids around any electrical sockets and chemically treat the bed frames and other furniture. Then we do a two-week follow-up to make sure there's no more activity."

Detecting bed bug activity is a science in itself. While most PMPs rely on visual inspection by their technicians, sometimes in conjunction with monitoring, 14 percent continue to swear by canine detection. Scott Mullaney has built Unique Pest Management on demand for this service, which is very high in 2022.

"Business dropped off the cliff when

COVID hit, but it has come back with a vengeance over the past year,” Mullaney said. “Customers appreciate the accuracy of highly trained, well-maintained canine teams, as well as their ability to cover large spaces. Paired with visual inspection, canine detection can be an extremely valuable tool. That’s apparent not only in customers’ interest in the service but in their willingness to pay a premium for it. A lot of PMPs don’t use canine detection because they think their customers won’t pay what it’s worth. Our business growth proves that they will.”

# The Path of LEAST Resistance

Bed bugs aren’t going to go down without a fight. Here’s how often PMPs need to battle back and how they do it.

With PMPs leaning heavily on pesticides for bed bug treatments, it makes good sense to watch out for resistance. In fact, a lot of PMPs are rotating products as a matter of course. Fortunately, there are plenty of products to choose from.

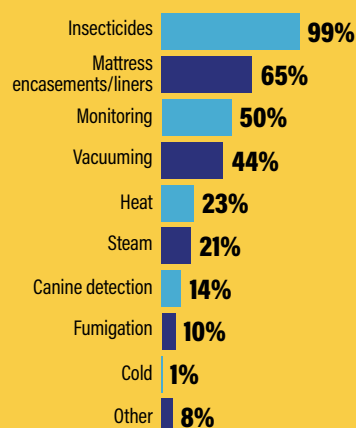
“We’ve seen resistance in the past and want to make sure it doesn’t compromise our treatment success going forward, so we stay ahead of the game,” said John Young of Speed Exterminating Company in Cleveland, Ohio. “We use a different product for the second application and, if need be, another for the third application.”

According to the survey, 37 percent of PMPs have implemented a bed bug resistance treatment protocol; 63 percent have not. Of those who have a resistance protocol in place, 90 percent include product rotation.

Amanda Forrestall of Pest-End, Plaistow, N.H., said it will be interesting to see if the past two years of people sticking close to home will affect resistance. “If people were self-treating, then we’re likely to see more product resistance in the next round of bed bugs. That could mean more callbacks,” she said. “On the other hand, we may find that one application works because the bed bugs haven’t been in contact with any product for a while.”

## A REAL TREAT

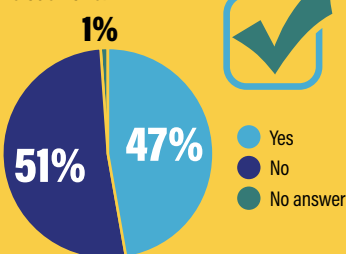
Which of these treatments or service regimens does your company location use to control bed bugs?



Source: Readex Research; Number of Respondents: 142; Respondents could select multiple answers

## PREP WORK

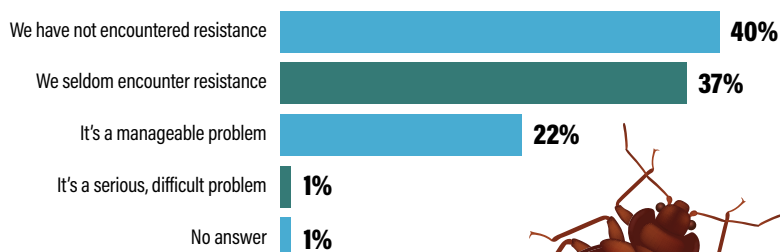
Does your company location offer a low-prep option for bed bug treatment?



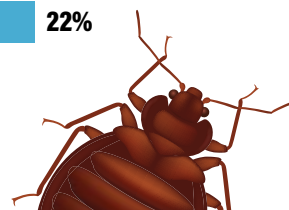
Source: Readex Research; Number of Respondents: 142

## THE DEFIANT ONES

How would you characterize the level of bed bug resistance in your market area?



Source: Readex Research; Number of Respondents: 142



## About this Survey

The PCT 2022 State of the Bed Bug Control Market survey was sponsored by Envu and compiled by Readex Research, a privately held research firm in Stillwater, Minn.

A sample of 4,467 pest control company owners, operators, executives and technical directors was systematically selected from the PCT database. Data was collected from 165 respondents — a 4 percent response rate — via online survey from July 27-Aug. 9, 2022. The margin of error for percentages is plus or minus 76 percentage points at the 95 percent confidence level. Charts may not add up to 100 percent due to rounding.





# Powerful inside and out

Temprid® FX insecticide tackles the toughest pest challenges with long-lasting control, unmatched flexibility and reduced callbacks.

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FX